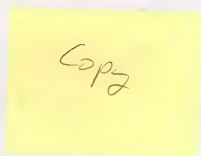


# Information Services Industry Trends

MS-2

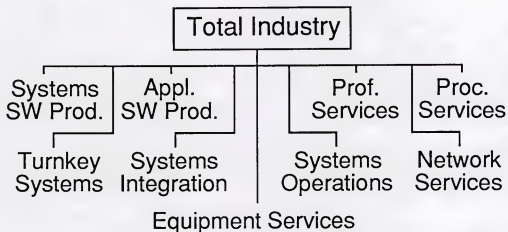
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Notes





# Information Services Industry Structure



IS-2

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Notes



# Information Services Market

- Major Trends
  - Slow rebound from U.S. recession, 1991-1992
  - Information services growth rate—12% to 15% per year

IS-3a

INPUT

Notes



## Information Services Market

- Major Trends
  - Growing acceptance of standards, open systems
  - Systems complexity fuels need for vendor expertise

IS-4a

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Notes





## Information Services Market

- Major trends
  - Shift to client/server gaining momentum
  - Outsourcing acceptance increasing

IS-4c

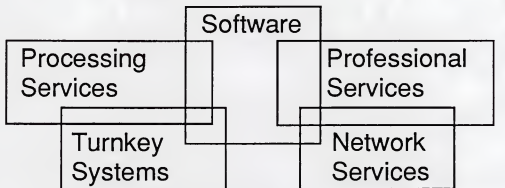
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Notes



# IS Market Structure—1980s

## *INPUT's View*



IS-10

INPUT

Notes

the 1990s, the number of people in the UK who are aged 65 and over has increased by 1.5 million, and the number of people aged 75 and over has increased by 1.1 million (Office for National Statistics 1999).

There is a growing awareness of the need to address the needs of older people in the community. The Department of Health (1999) has published a strategy for older people, which sets out a vision for the future of older people's services. The strategy is based on the following principles: older people should be able to live independently in their own homes; older people should be able to participate in the community; and older people should be able to access the services they need.

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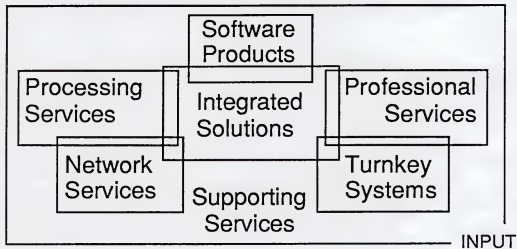
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Information Services Market Structure—1990s  
*Emphasis on Supporting Services*



IS-11

Notes



# Market Forecasts

MF- 1

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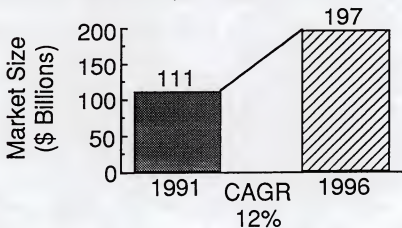
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## U.S. Information Services Market, 1991-1996



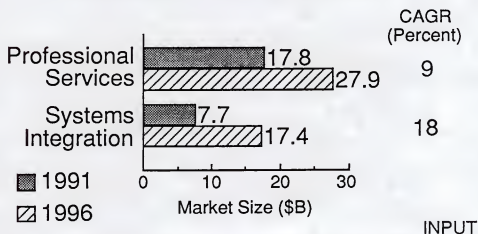
MF-3

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Notes



# U.S. Information Services Market, 1991-1996



MF-4a

## Notes

the 1990s, the number of people in the UK who are aged 65 and over has increased by 1.5 million (1990–1999) and is projected to increase by a further 1.5 million by 2020 (Office of National Statistics 2000).

There is a growing awareness of the need to develop strategies to meet the needs of the ageing population. The Department of Health (2000) has identified the need to develop a new paradigm of care for the ageing population, one that is based on the concept of 'active ageing'. This paradigm is based on the idea that older people should be able to live independently, to participate in social and community activities, and to maintain their physical and mental health. The Department of Health (2000) has identified a number of key areas for action in order to achieve this paradigm, including: improving the physical environment for older people; promoting healthy living; and improving the quality of care for older people.

The Department of Health (2000) has also identified a number of key areas for action in order to improve the quality of care for older people, including: improving the quality of care in residential care homes; improving the quality of care in the community; and improving the quality of care in the hospital. The Department of Health (2000) has also identified a number of key areas for action in order to improve the quality of care in residential care homes, including: improving the quality of care in nursing homes; improving the quality of care in residential care homes for the elderly; and improving the quality of care in residential care homes for people with mental health problems.

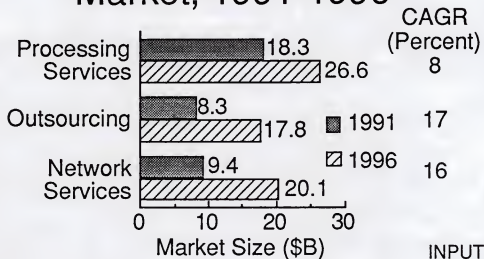
The Department of Health (2000) has also identified a number of key areas for action in order to improve the quality of care in the community, including: improving the quality of care in community care homes; improving the quality of care in community care homes for the elderly; and improving the quality of care in community care homes for people with mental health problems. The Department of Health (2000) has also identified a number of key areas for action in order to improve the quality of care in the hospital, including: improving the quality of care in hospital care homes; improving the quality of care in hospital care homes for the elderly; and improving the quality of care in hospital care homes for people with mental health problems.

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## U.S. Information Services Market, 1991-1996



MF-4b

Notes

the 1990s, the number of people with a mental health problem has increased by 50% (Mental Health Foundation 2000). The prevalence of mental health problems has increased in the general population, and the incidence of mental health problems has increased in the prison population.

There is a growing awareness of the need to address the mental health needs of prisoners. The Department of Health (2000) has published a strategy for mental health services, which includes a commitment to improve the mental health of prisoners. The Department of Health (2000) has also published a strategy for mental health services, which includes a commitment to improve the mental health of prisoners.

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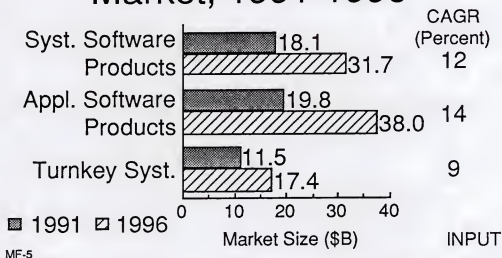
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## U.S. Information Services Market, 1991-1996



Notes

the 1990s, the number of people in the UK who are employed in the public sector has increased by 1.5 million, from 2.5 million in 1980 to 4 million in 1995. The public sector has become a major employer in the UK, and its growth has been a major factor in the overall growth of the economy.

The public sector has also become a major employer of women. In 1980, women made up 40% of the public sector workforce, and by 1995, this figure had risen to 50%. This increase in the number of women in the public sector has been a major factor in the overall increase in the number of women in the workforce. The public sector has also become a major employer of young people. In 1980, young people made up 10% of the public sector workforce, and by 1995, this figure had risen to 20%.

The public sector has also become a major employer of people with disabilities. In 1980, people with disabilities made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%. This increase in the number of people with disabilities in the public sector has been a major factor in the overall increase in the number of people with disabilities in the workforce. The public sector has also become a major employer of people from ethnic minorities. In 1980, people from ethnic minorities made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%.

The public sector has also become a major employer of people who are over 50 years of age. In 1980, people over 50 years of age made up 10% of the public sector workforce, and by 1995, this figure had risen to 20%. This increase in the number of people over 50 years of age in the public sector has been a major factor in the overall increase in the number of people over 50 years of age in the workforce. The public sector has also become a major employer of people who are under 20 years of age. In 1980, people under 20 years of age made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%.

The public sector has also become a major employer of people who are over 65 years of age. In 1980, people over 65 years of age made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%. This increase in the number of people over 65 years of age in the public sector has been a major factor in the overall increase in the number of people over 65 years of age in the workforce. The public sector has also become a major employer of people who are under 16 years of age. In 1980, people under 16 years of age made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%.

The public sector has also become a major employer of people who are over 75 years of age. In 1980, people over 75 years of age made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%. This increase in the number of people over 75 years of age in the public sector has been a major factor in the overall increase in the number of people over 75 years of age in the workforce. The public sector has also become a major employer of people who are under 12 years of age. In 1980, people under 12 years of age made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%.

The public sector has also become a major employer of people who are over 85 years of age. In 1980, people over 85 years of age made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%. This increase in the number of people over 85 years of age in the public sector has been a major factor in the overall increase in the number of people over 85 years of age in the workforce. The public sector has also become a major employer of people who are under 8 years of age. In 1980, people under 8 years of age made up 5% of the public sector workforce, and by 1995, this figure had risen to 10%.



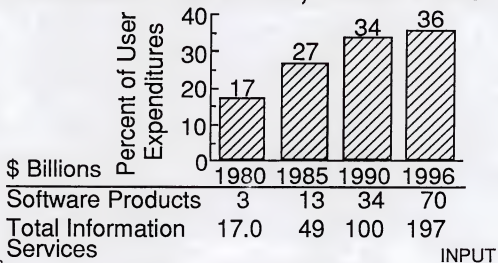
# Software Products

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MPRE-407

Notes



## Software Products Portion of Information Services, 1980-1996

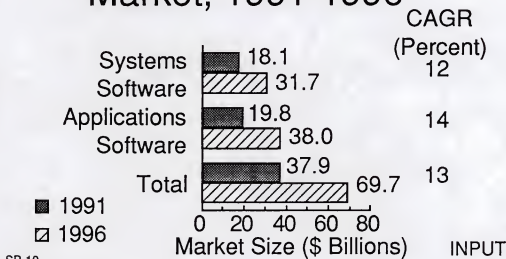


SP-18

Notes



# U.S. Software Products Market, 1991-1996



Notes

the 1990s, the number of people with a mental health problem has increased by 50% (Mental Health Foundation 2000). The prevalence of mental health problems in the UK is estimated to be 10% (Mental Health Foundation 2000).

There is a growing awareness of the need to address the needs of people with mental health problems in the workplace. The Mental Health Foundation (2000) has estimated that the cost to the UK economy of mental health problems is £10 billion per year. This is due to the fact that people with mental health problems are often unable to work, and this leads to a loss of productivity. The Mental Health Foundation (2000) also estimates that the cost to the UK economy of mental health problems is £10 billion per year. This is due to the fact that people with mental health problems are often unable to work, and this leads to a loss of productivity.

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# Systems Software Products

SP-157

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Notes

the 1990s, the number of people with a mental health problem has increased by 50% (Mental Health Foundation 2000). The prevalence of mental health problems has increased in the general population, and the incidence of mental health problems has increased in the prison population.

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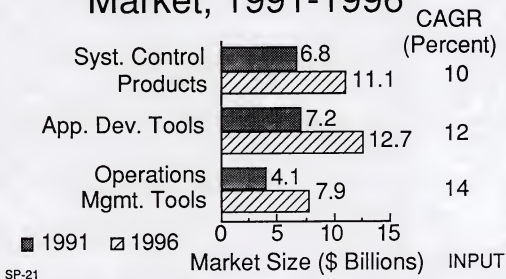
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# Systems Software Products Market, 1991-1996



Notes



# Applications Software Products

SP-116

Notes

the 1990s, the number of people with a mental health problem has increased by 50% (Mental Health Foundation 2000). The prevalence of mental health problems in the UK is estimated to be 10% (Mental Health Foundation 2000).

There is a growing awareness of the need to address the needs of people with mental health problems. The Department of Health (2000) has published a strategy for mental health care, which aims to improve the lives of people with mental health problems. The strategy is based on the following principles:

- People with mental health problems should be treated as individuals, with their own needs and wishes.
- People with mental health problems should be given the opportunity to participate in decisions about their care.
- People with mental health problems should be given the opportunity to live in the community.
- People with mental health problems should be given the opportunity to work and study.
- People with mental health problems should be given the opportunity to form and maintain relationships.

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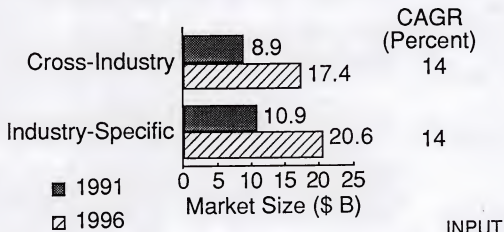
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# U.S. Applications Software Products Market, 1991-1996

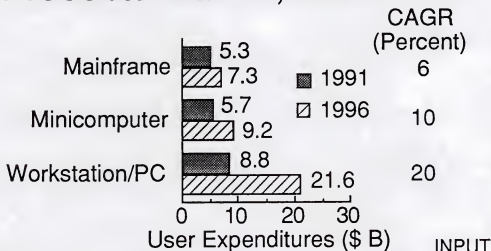


SP-121

Notes



# Applications Software Products Market, 1991-1996



SP-127

Notes





Applications Software Products

## Driving Forces

- New technologies
- New products
- Customer emphasis on productivity improvements
- Pent-up demand for new products

SP-117

Notes

the 1990s, the number of people in the UK who are employed in the public sector has increased by 1.5 million, from 2.5 million in 1980 to 4 million in 1995. The public sector has become a major employer in the UK, and its growth has been a key factor in the overall growth of the economy.

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Applications Software Products

## Growth Inhibitors

- Maturity of traditional products
- Slowdown in hardware sales
- New products still being developed
- Customer confusion

SP-118

Notes



Applications Software Products

## Shifting Technology Foundation

- Standards
- Downsizing and client/server
- Networking and integration
- Distributed data

SP-119a

Notes

the 1990s, the number of people in the UK who are aged 65 and over has increased by 1.5 million (1990–2000) and is projected to increase by a further 1.5 million by 2020 (Office for National Statistics 2001). The number of people aged 65 and over who are living alone has increased from 1.1 million in 1990 to 1.5 million in 2000, and is projected to increase to 2.0 million by 2020 (Office for National Statistics 2001). The number of people aged 65 and over who are living in a care home has increased from 0.5 million in 1990 to 0.7 million in 2000, and is projected to increase to 0.9 million by 2020 (Office for National Statistics 2001).

There is a growing awareness of the need to address the needs of older people, and a number of initiatives have been developed to address this need. The Department of Health has established the Older People's Unit, which is responsible for developing and implementing policies and programmes to improve the lives of older people. The Older People's Unit has established a number of working groups, including the Older People's Forum, the Older People's Research Group, and the Older People's Policy Group. The Older People's Forum is a multi-agency forum that brings together representatives from a range of organisations, including the Department of Health, local authorities, and voluntary organisations, to discuss and coordinate the provision of services for older people. The Older People's Research Group is a group of researchers who are working on a range of issues relating to older people, including health, social care, and housing. The Older People's Policy Group is a group of policy-makers who are responsible for developing and implementing policies and programmes to improve the lives of older people.

The Older People's Unit has also established a number of initiatives to improve the lives of older people. The Older People's Forum has established a number of working groups, including the Older People's Health Working Group, the Older People's Social Care Working Group, and the Older People's Housing Working Group. The Older People's Health Working Group is responsible for developing and implementing policies and programmes to improve the health of older people. The Older People's Social Care Working Group is responsible for developing and implementing policies and programmes to improve the social care of older people. The Older People's Housing Working Group is responsible for developing and implementing policies and programmes to improve the housing of older people.

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The Older People's Unit has also established a number of initiatives to improve the lives of older people. The Older People's Forum has established a number of working groups, including the Older People's Health Working Group, the Older People's Social Care Working Group, and the Older People's Housing Working Group. The Older People's Health Working Group is responsible for developing and implementing policies and programmes to improve the health of older people. The Older People's Social Care Working Group is responsible for developing and implementing policies and programmes to improve the social care of older people. The Older People's Housing Working Group is responsible for developing and implementing policies and programmes to improve the housing of older people.

Applications Software Products

## Shifting Technology Foundation

- Graphical user interface
- Imaging
- Engineered/re-engineering software

SP-119b

Notes





Applications Software Products

## User Survey

- 24% budget increase for 1992
- Mainframe-based spending declining; workstation/PC-based spending increasing
- More cross-industry spending

SP-165a

INPUT

Notes



# Professional Services

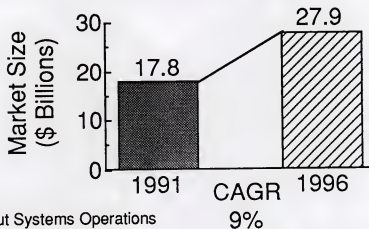
PF-1

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Notes



## U.S. Professional Services Market,\* 1991-1996



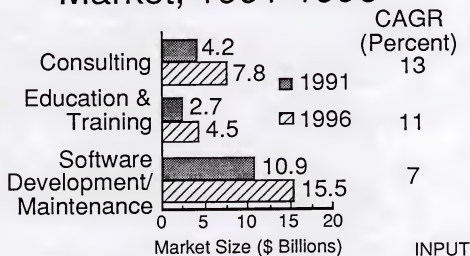
\* Without Systems Operations

PF-11

Notes



# U.S. Professional Services Market, 1991-1996



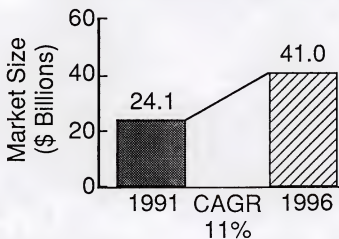
PF-12

Notes





## U.S. Professional Services All Market Sectors

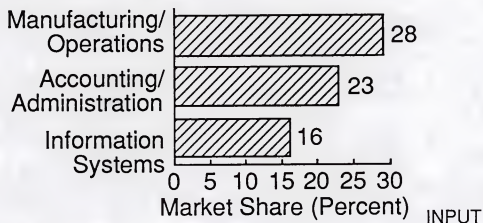


PF-66

Notes



## Professional Services Expenditures by Area

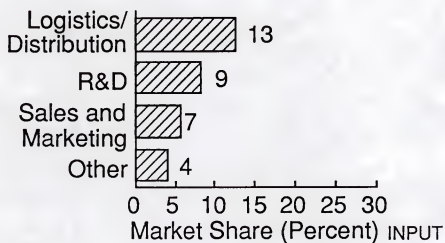


PF-14

Notes



## Professional Services Expenditures by Application Area



PF-15

Notes



## New Professional Services

- Application maintenance
- Application management
- Re-engineering management

PF-24

INPUT

Notes





## Opportunities and Recommendations

- Specialize
- Develop alliances within other delivery modes
- Enhance education and training offerings
- Follow standards and regulatory processes
- Monitor new technologies

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PF-19

Notes



# Downsizing Revolution

INPUT

ID- 59

Notes

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## Downsizing

- Enabled by technology
- Driven by organization factors
  - Positive, ownership
  - Negative, failures

MACFC-PAC-3

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Notes

the 1990s, the number of people in the UK who are employed in the public sector has increased by 1.5 million, from 2.5 million in 1980 to 4 million in 1995 (Department of Health 1996).

There is a growing emphasis on the need to improve the efficiency of the public sector, and to ensure that the public sector is able to deliver the services that are required by the public. This has led to a number of initiatives, including the introduction of competition, the restructuring of public sector organisations, and the introduction of performance measures.

One of the key initiatives in the public sector is the introduction of competition. This has led to a number of public sector organisations being privatised, and to a number of public sector organisations being required to compete for contracts. This has led to a number of public sector organisations being required to improve their efficiency, and to a number of public sector organisations being required to improve their quality of service.

Another key initiative in the public sector is the restructuring of public sector organisations. This has led to a number of public sector organisations being merged, and to a number of public sector organisations being reorganised. This has led to a number of public sector organisations being required to improve their efficiency, and to a number of public sector organisations being required to improve their quality of service.

A third key initiative in the public sector is the introduction of performance measures. This has led to a number of public sector organisations being required to measure their performance, and to a number of public sector organisations being required to improve their performance. This has led to a number of public sector organisations being required to improve their efficiency, and to a number of public sector organisations being required to improve their quality of service.

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# IS Environment

"Old" Traditional	"New" Downsized
Mainframe	Client/server
Shared	Dedicated
Remote	Local
IS operated	User operated

ID-96

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Notes





## Documenting the Downsizing Trend

*CIO survey results show*

- 80% have identified target applications suites
- 40% have projects or pilots underway

*...A significant opportunity exists!*

ID-102

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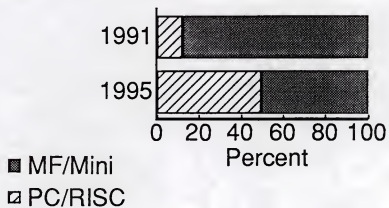
Notes

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## Platform Trends

# Production Applications



ID-103

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## Notes



## IS Model for the '90s

Platform	M/F	Mini	Micro/WS
User	Cent. IS	Dept. IS	Pwr User/User
Envmt.	Client/Server		
Appl. SW Prod.	Enterprise-Critical	Dept.-Critical	Prodtvty

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ID-126

Notes

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# Impact of Downsizing on Software Product Vendors

- What's changing?...Everything!
- Who's affected?...Everyone!

INPUT

ID-129

Notes





## Application SW Product Vendors

<u>Attributes</u>	<u>Old</u>	<u>New</u>
Features	Fixed	Constantly adding
Updates	Infrequent	Frequent
Sales	Field	Direct/indirect
Cost of sales	Labor bias	Advertising bias
Price	\$10,000+	\$100+
Customers	100s	100,000s

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ID-130

Notes



## Key Opportunities for Vendors

- “Desktop services”—support and transition mgt.
- Distributed integrated platform offerings (*integrated workstation/ LAN/OS environments*)

ID-114a

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Notes

10/16/92



## Key Opportunities for Vendors

- Transition management services
- Applications software products/  
development (*distributed  
environments*)

ID-114b

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Notes



## Key Moves for Industry Participants

Class	Opportunity
SI and PS	<ul style="list-style-type: none"><li>• SI for downsized environments</li><li>• Methodology for apps. downsizing</li><li>• Templates for distributed apps.</li></ul>

ID-115

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Notes





## Key Moves for Industry Participants

Class	Opportunity
Software products	• Distributed integrated platforms (DIP)
Turnkey systems	• Desktop services
	• Apps. development—distributed

ID-117

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Notes



# Competition

CO-40

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Notes



# Andersen Consulting Services Evolution

Management Consulting

Professional Services

Software Products

Systems Integration

Systems Management

Systems Operations

CO-4

INPUT

Notes

the 1990s, the number of people with a mental health problem has increased by 50% (Mental Health Foundation 2000). The prevalence of mental health problems has increased in the general population, and the incidence of mental health problems has increased in the prison population.

There is a growing awareness of the need to address the mental health needs of prisoners. The Department of Health (2000) has published a strategy for mental health services, which includes a commitment to improve the mental health of prisoners. The Department of Health (2000) has also published a strategy for mental health services, which includes a commitment to improve the mental health of prisoners. The Department of Health (2000) has also published a strategy for mental health services, which includes a commitment to improve the mental health of prisoners.

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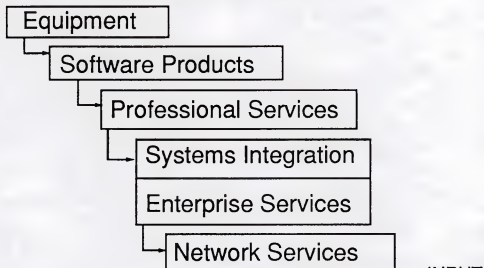
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# Digital Equipment



CO-11

Notes

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# EDS

Systems Operations

Systems Integration

Processing Services

Network Mgmt.

Business Operations

CO-14a

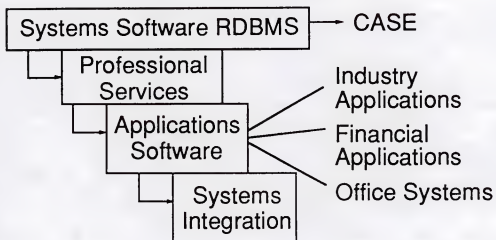
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Notes

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# Oracle



CO-24

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Notes



# IBM Performance

What used to work  
doesn't work now

CO-49

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Notes



## IBM—The Positive Points

- A revenue leader in every market
- Immense resources
  - Human
  - Financial
- Worldwide geographic coverage
- Reputation for quality

INPUT

CO-33

Notes





## IBM—Market Perceptions

- Inertia—tradition/size
- Product vs. services orientation
- False starts in solution selling
- Organizational positioning
- Lack of vertical focus—business solutions
- Aversion to risk

CO-32

INPUT

Notes



## IBM—Recommendations

- Organize for rapid response
- Position as a solution provider
- Refine the art of the deal
- Target the market
  - Cross-industry
  - Vertical

CO-34

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Notes

